Research Findings
Monday.com and Clickup.com
May 1, 2023

Today, in hopes of lowering my clients' costs, I researched Monday.com and Clickup.com, both inexpensive project management, work flow, and Customer Relationship Management (CRM) platforms. This research leaves me reflecting upon what I, as an Economist, call "The Cost of Cheap" and "The Cost of Free."

Schema. Both programs are built on a User Profile > Work Space > Board scheme. In the left margin there are also Folders just as in popular email programs like Gmail or Outlook, where Boards and Documents can be stored and shuffled.

Monday's complete structure is User Profile > Work Space > Board > Groups > Items, and all details are recorded and managed at the Item level. Clickup's structure is a little more detailed, entailing a steeper learning curve, but the overall structural concept or schema is quite similar.

In my opinion this is a problem, especially for small businesses, because the programs force you to compartmentalize your business into different departments, each with its own "Work Space" like Sales, Service, Accounting, HR, Admin, etc.

In reality, most small and mid sized businesses are holistic. Owners and managers wear many hats throughout the day. I think it's unwieldy and cumbersome to expect them to be constantly switching "Work Spaces." They should be able to do everything from one place.

One-to-Many Relationships. Both programs are designed to handle one-to-many relationships using crude folders and sub-folders which can quickly become chaotic and grow out of control in a business that is even moderately busy. If you've ever seen an overwhelmed Outlook or Gmail user, you know what I mean. Folders, folders everywhere and none of them makes much sense.

And a typical one-to-many relationship is that many contacts work for one company, or one contact may have several projects. Unlike a true relational database, neither platform handles these one-to-many relationships well, setting the user up for exasperation, confusion, and disappointment. Instead, they force the user into a Work Space > Board straitjacket that, while expedient in the short term, will not facilitate growth or scale or accommodate the truly holistic nature of the business' operations.

Contacts. Every business of any size has one customer list. **One.**

But in both programs it's not possible to have one contact list. Contact lists are made and managed as Items on Boards. Even within a single Work Space, each board has its own Contacts list. This presents the problem of duplication and an inability to work well with other programs that do have one customer list (like QuickBooks Online).

In my opinion, since all businesses are in the business of making money in their customer relationships, without having to inquire any further into other features, this alone is a deal breaker.

A good management information system integrates with accounting and provides one complete customer record containing sales history, appointments, work records, email correspondence, notes, files, links, and so forth.

Accounting Integration. Monday.com has a native QuickBooks Online integration. Clickup.com does not, but integration can be achieved via "Middleware" like make.com or Zapier. This entails the cost of the middleware and the cost of developer talent making and maintaining the connection. But since QuickBooks Online has one customer list and these progams do not, I would not trust it; I wouldn't even make the attempt; I wouldn't even "go there."

Bearing in mind that the purpose of work flow and project management is to make money, doesn't it make sense that you would want a tight integration with the financial results in your accounting system so that you could easily relate efforts to results, particularly your customer records since they're the ones paying your invoices?

I think so. Yet neither of these platforms offers the kind of accounting integration I would expect.

Time Keeping. Time keeping in both platforms is Item- and Work Space-centric. It isn't what I've come to call Whole Day Time Keeping (WDTK) in which workers record their whole day as it unfolds on a single record that represents their day. Rather, they have to jump from work space to work space, from board to board, from item to item, to record their time, and there is no easy way to see whether they've recorded their whole day (for which they are paid), or fragments of it.

Recording the whole day in a small and mid sized business is vital because life is full of surprises, both favorable and unfavorable. It's vital to notice the surprises, leverage the favorable ones, and mitigate the unfavorable ones. But if you're recording time in fragments, you'll miss both and won't have a reliable time record for payroll purposes. You'll have to track it elsewhere on a spreadsheet or the back of an envelope, and that isn't lean. It's better to track all time completely in one place.

> *(Creepy Surveillance: Time Doctor*. Studying Clickup's time keeping functionality, I learned it's designed to work with Time Doctor, a Chrome extension that is really an employee surveillance tool that not only tracks time, but also keyboard keystrokes and Internet activity. I thought that was kind of creepy and Big Brother.
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> How many employees want to be surveilled? Um, last time I checked, the answer was **NONE**.)

Email Integration. From one Monday.com user I learned he turned off the email integration because he wasn't able to filter it by project. Although both platforms follow a strict "Board" or project structure, if you activate the email integration you don't just get emails that pertain to a project.   You get EVERYTHING which makes for an incredible amount of extraneous, irrelevant chatter in your email feed. As a work-around he keeps project notes and copy/pastes the bodies of noteworthy project-relevant emails into a note.

That is clunky, and it isn't lean. It is possible to filter emails so that only project related emails appear in a project record, but not in these platforms. A good system should do so.

Roles & Permissions. I didn't notice much rigor concerning Roles and Permissions. It appeared to be, what you see is what you get, and everyone gets to see pretty much the same things: Work Spaces, Boards, Groups, & Items. Clickup does distinguish "Members" from "Guests" but that's about as far as it goes.

In a good organizational management system, role and permission granularity should be available down to the level of individual fields in a record. For example maybe you want some employees to be able to look up a customer's phone number without seeing their invoices, or see revenues but not expenses, payroll, or profits.

Output: Reports & Charts. Both platforms offer report widgets and charts, but they are silo'd within a given Work Space. I didn't see a way to roll up everything for the whole business. And within one Work Space, if each Board has its own Contacts list, how could you possible get a Customer Summary for the whole Work Space?

So while there are report widgets and charts, I find that they're very low and small, there isn't really a way to get higher level summaries for the whole enterprise. And without solid accounting integration for verification and validation, what is the point? GIGO . . . Garbage In, Garbage Out.

CRM Functionality. In these platforms, CRM occurs within a single Work Space, so it isn't possible to have one enterprise-wide CRM. Each department has its own, making for scattered, disintegrated, fragmented customer and prospect relationship intel. See the above discussion about scattered Contact lists.

Also, in my opinion a good CRM should not "punt" email campaign functionality to a third party vendor like Constant Contact or Mail Chimp. All of that activity should occur within the CRM application; but within these two platforms, it does not.

What if you want to send some kind of product or service announcement to a group of people? That is so basic in relationship management; it's one of the advantages of computers. But these platforms force you to spend more money on a third party vendor to have a voice. Until you spend that money and do that setup and attend to that connection, which may or may not be reliable, you are gagged. In my opinion, that's a deal breaker.

In conclusion, the choice of a cheap or free Monday.com or Clickup.com, or similar tool, is certainly expedient, but it's a recipe for frustration, disintegration, and consequential hidden costs like third party vendors, middleware, admin labor, consultants' fees stitching it all together like a Frankenstein monster, and opportunity cost.

That is The Cost of Cheap and The Cost of Free. For better options, please contact me.

Respectfully submitted,

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